



Alternatives

Application Process Guide

Haatch SEIS / EIS



Adviser Registration

Register as an adviser on the Haatch Portal
https://haatch.joinfurther.com/?utm_source=titan
(Enter personal details such as personal/organisation FCA number).

Check your inbox for a verification email and link to confirm your account.

A video 'walkthrough' for the registration process can also be found on the Adviser Centre.



Investor Registration

Log in and initiate a new application.

Create a new investor profile (or select their profile from the drop down).

Fill in the investor details and upload an Identity Verification Certificate (IVC) or Confirmation of Verification of Identity (COVI).



Application

Choose the fund in which the investor wishes to invest (**Select either EIS or SEIS Fund**)

Specify the investment amount. Input the adviser fee. Submit the details and send the application to the investor for their review and completion.

The investor then receives an email to register for the platform. They will then be asked to review the application, input any additional information and submit the application.



Confirmation

Both adviser & investor will receive a confirmation email with an application acknowledgement and fund transfer information (incl unique payment ref number). Followed by an email to adviser & investor to confirm funds once received and matched.



Deployment

Once funds have been deployed, the adviser & investor will receive an email confirming each portfolio company deployment. Details will also be logged on the portal account.



Certificates

When EIS certificates are issued, they are uploaded to the portal and the adviser & investor receive an email confirmation that they are available.

Get in Touch Client Services

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